



TERO CONSULTING  
Complete Maintenance Services



*Developed By: Tero*

## **User's Guide Version 5.2**

Developed by:

Tero Consulting Ltd.  
200 – 2441 United Boulevard  
Coquitlam, BC V3K 6A8  
[www.teroconsulting.com](http://www.teroconsulting.com)



# **Table of Contents**

## **System Overview**

- 1.1 System Requirements
  - 1.1.1 Pre-Installation Requirements
- 2.1 System Setup
  - 2.1.1 Installing The Web Work Application
  - 2.1.2 Installing Additional Web Work Components
  - 2.1.3 Web Browser Setup
  - 2.1.4 Disabling Server Side Debugging
  - 2.1.5 Changing the Timeout Default
- 3.1 Logging into the System
  - 3.1.1 Exiting the Web Work System
- 4.1 System Overview
  - 4.1.1 Web Work Screen Modes
  - 4.1.2 Query By Example
  - 4.1.3 Wildcard Explanations
  - 4.1.4 Query by Example – Example 1
  - 4.1.5 Query by Example – Example 2
- 5.1 System Modules
- 6.1 Screen Layout
  - 6.1.1 Internet Tool Bar
- 7.1 Program Icons
- 8.1 Web Work Help Options
  - 8.1.1 System Overview Help
  - 8.1.2 Module Help
  - 8.1.3 Field Help
  - 8.1.4 Customizing Help Files
  - 8.1.5 Tip of the Day
  - 8.1.6 Contacting Tero Consulting Ltd.
- 9.1 Web Work – Cellular Phone Features
- 10.1 Changing your Password

## **Work Requests Module**

- 1.1 Overview of the Work Requests Module
- 2.1 Creating Work Order Requests
  - 2.1.1 To Create a Work Request
  - 2.1.2 Editing Work Requests
- 3.1 Work Requests – Estimates
- 4.1 Performing Work Request Queries
  - 4.1.1 To Perform a Work Request Query
- 5.1 Printing Work Requests
- 6.1 Links

## **Work Orders Module**

- 1.1 Overview of the Work Order Module
- 2.1 Creating New Work Orders
  - 2.1.1 To Create a Work Order
- 3.1 Changing the Status of a Work Order
  - 3.1.1 Approving Work Orders
  - 3.1.2 Changing the Status of a Work Order
  - 3.1.3 Work Order Status History
- 4.1 Adding Estimates to a Work Order
  - 4.1.1 Adding Estimates – Tasks
  - 4.1.2 Adding Estimates – Labour
  - 4.1.3 Adding Estimates – Materials
- 5.1 Work Order – Actuals
  - 5.1.1 Adding Work Order Actuals
  - 5.1.2 Adding Actual Tasks to a Work Order
  - 5.1.3 Adding Actual Labour to a Work Order
  - 5.1.4 Adding Actual Materials to a Work Order
  - 5.1.5 Adding Actuals to a Work Order – Example 1
  - 5.1.6 Converting Estimates to Actuals
  - 5.1.7 Editing Estimates and Actuals
  - 5.1.8 Updating Procedures
- 6.1 Adding Remarks to a Work Order
- 7.1 Work Order Accounts
  - 7.1.1 Applying Costs to more than one account
  - 7.1.2 Editing Work Order Accounts
- 8.1 Performing Work Order Queries
  - 8.1.1 Performing Work Order Queries
  - 8.1.2 Work Order Queries – Examples
  - 8.1.3 History Filter
  - 8.1.4 Saving Work Order Queries
  - 8.1.5 Running Saved Queries
  - 8.1.6 Editing Saved Queries
- 9.1 Completing Work Orders
  - 9.1.1 Completing a Single Work Order
  - 9.1.2 Batch Complete Query
  - 9.1.3 Viewing Completion Details
- 10.1 Closing Work Orders
- 11.1 Emailing Work Orders

## **Procedures Module**

- 1.1 Overview of the Procedure Module
- 2.1 Using Procedures
- 3.1 Procedure Estimates
  - 3.1.1 Adding Estimates when a Procedure is Created

- 3.1.2 Adding Estimates to an Existing Procedure
- 3.1.3 Adding Estimates – Tasks
- 3.1.4 Adding Estimates – Labour
- 3.1.5 Adding Estimates – Materials
- 3.1.6 Editing Procedure Estimates

- 4.1 Duplicating Procedures
- 5.1 Procedure Accounts
  - 5.1.1 Applying Procedure Costs to Multiple Accounts
- 6.1 Deleting Procedures
- 7.1 Performing Procedure Queries
  - 7.1.1 To Perform a Procedure Query
  - 7.1.2 Procedure Queries – Example 1
- 8.1 Printing Procedures
  - 8.2 Printing Individual Procedures
  - 8.3 Printing Multiple Procedures
- 9.1 Procedure – Reports
  - 9.1.1 Creating Procedure Reports
  - 9.1.2 Printing Procedure Reports
- 10.1 Links

## **PMs Module**

- 1.1 Overview of the PM Module
- 2.1 Creating PMs
  - 2.1.1 Creating PMs
  - 2.1.2 Creating PMs – Example 1
- 3.1 Adding Estimates to a PM
  - 3.1.1 Adding Estimates – Tasks
  - 3.1.2 Adding Estimates – Labour
  - 3.1.3 Adding Estimates – Materials
  - 3.1.4 Editing PM Estimates
- 4.1 PM Accounts
  - 4.1.1 Applying PM Costs to Multiple Accounts
- 5.1 Deleting PM Records
- 6.1 Performing PM Queries
  - 6.1.1 To Perform a PM Query
- 7.1 Generating PMs
  - 7.1.1 Generating Calendar Based PMs
  - 7.1.2 Generating Meter Based PMs
  - 7.1.3 Generating Specific PMs
- 8.1 Printing PMs
  - 8.1.1 Printing PMs that have been Generated
  - 8.1.2 Printing Individual PM Records
  - 8.1.3 Printing Multiple PM Records
- 9.1 Show Work Orders
- 10.1 PM Calendars
- 11.1 PM Reports
  - 11.1.1 Creating PM Reports

- 11.1.2 Printing PM Reports

- 12.1 Links

## **Equipment Module**

- 1.1 Overview of the Equipment Module
- 2.1 Creating New Equipment Records
  - 2.1.1 What are Parent/Child Equipment Records
  - 2.1.2 Creating Equipment Records
- 3.1 Duplicating Equipment Records
- 4.1 Equipment Specifications
  - 4.1.1 Adding Equipment Specifications
  - 4.1.2 Editing Equipment Details
  - 4.1.3 Searching Specifications
- 5.1 Using Equipment Parts Lists
  - 5.1.1 Adding Parts to an Equipment Record
  - 5.1.2 Editing Parts Lists
  - 5.1.3 Searching Specifications
- 6.1 Meter Readings
- 7.1 Modifying Equipment Records
  - 7.1.1 To Modify Equipment Records
  - 7.1.2 Equipment – Modification History
- 8.1 Deleting Equipment Records
- 9.1 Performing Equipment Queries
  - 9.1.1 To Perform an Equipment Query
  - 9.1.2 Equipment Queries – Example 1
- 10.1 Equipment PM List
- 11.1 Printing Equipment Records
  - 11.1.1 Printing Individual Equipment Records
  - 11.1.2 Printing Multiple Equipment Records
- 12.1 Equipment – Reports
  - 12.1.1 Creating Equipment Records
  - 12.1.2 Printing Equipment Records
- 13.1 Links

## **Locations Module**

- 1.1 Overview of the Locations Module
- 2.1 Creating New Location Records
  - 2.1.1 What are Child/Parent Locations
  - 2.1.2 Adding New Location Records
  - 2.1.3 Entering Locations – Example 1
- 3.1 Duplicating Location Records
  - 3.1.1 Duplicating Locations – Example 1
- 4.1 Location Specifications
  - 4.1.1 Adding Location Specifications

- 4.1.2 Search Specifications
- 4.1.3 Search Specifications – Example 1

## 5.1 Deleting Locations

## 6.1 Performing Location Record Queries

- 6.1.1 To Perform a Location Query
- 6.1.2 Location Queries – Example 1

## 7.1 Viewing Equipment Lists

## 8.1 Printing Location Records

- 8.1.1 Printing Individual Location Records
- 8.1.2 Printing Multiple Location Records

## 9.1 Location – Reports

- 9.1.1 Creating Location Reports
- 9.1.2 Printing Location Reports

## 10.1 Links

## Inventory Module

### 1.1 Overview of the Inventory Module

### 2.1 Adding Items to Inventory

### 3.1 Adding Additional Vendor s for an Inventory Item

### 4.1 Duplicating Inventory Items

### 5.1 Inventory Specifications

- 5.1.1 Adding Item Specifications
- 5.1.2 Searching Specifications

### 6.1 Deleting Inventory Items

### 7.1 Performing Inventory Queries

### 8.1 Creating Storerooms

### 9.1 Deleting Storerooms

### 10.1 Adding Inventory to Storerooms

- 10.1.1 Adding Inventory - Storeroom Module
- 10.1.2 Adding Inventory – Inventory Module

### 11.1 Editing Storeroom Information

- 11.1.1 Editing Storerooms – Storeroom Module
- 11.1.2 Editing Storerooms – Inventory Module

### 12.1 Performing Storeroom Queries

### 13.1 Returning Inventory Items

### 14.1 Where Used

### 15.1 Checking Requested Items

### 16.1 Printing Request Picklists

### 17.1 Issuing

### 18.1 Printing Inventory Records

- 18.1.1 Printing Individual Records

### 18.1.2 Printing Multiple Records

## 19.1 Inventory – Reports

- 19.1.1 Creating Inventory Reports
- 19.1.2 Printing Inventory Reports

## 20.1 Links

## Item Request Module

### 1.1 Overview of the Item Request Module

### 2.1 Creating Item Requests

- 2.1.1 To Create an Item Request

### 3.1 Editing Item Requests

### 4.1 Creating Item Lists

- 4.1.1 Adding Individual Line Items to a Request
- 4.1.2 Adding Request Kits to a Request
- 4.1.3 Editing Line Items
- 4.1.4 Deleting Line Items

### 5.1 Request Kits

- 5.1.1 Creating Request Kits
- 5.1.2 Editing Request Kits

### 6.1 Changing the Status of a Request

### 7.1 Item Request Accounts

- 7.1.1 Applying Requests to Multiple Accounts

### 8.1 Item Request Queries

- 8.1.1 To Perform an Item Request Query

### 9.1 Printing Item Requests

- 9.1.1 Printing Individual Item Requests
- 9.1.2 Printing Multiple Item Requests

### 10.1 Item Request – Report

- 10.1.1 Creating Item Request Reports
- 10.1.2 Printing Item Request Reports

### 11.1 Links

## Purchasing Module

### 1.1 Overview of the Purchasing Module

### 2.1 Creating Purchase Orders

### 3.1 Adding Line Items to a Purchase Order

### 4.1 Adding Requests to a Purchase Order

### 5.1 Duplicating Purchase Orders

### 6.1 Purchase Order Accounts

- 6.1.1 Applying PO Costs to Multiple Accounts

### 7.1 Approving Purchase Orders

### 8.1 Changing Vendors

### 9.1 Auto-Generating Purchase Orders

- 10.1 Closing Purchase Orders
- 11.1 Performing Purchase Order Queries
- 12.1 Printing Purchase Orders
  - 12.1.1 Printing Individual Purchase Orders
  - 12.1.2 Printing Multiple Purchase Orders
- 13.1 Vendors
  - 13.1.1 Creating New Vendors
  - 13.1.2 Deleting Vendors
- 14.1 Vendor Contacts
- 15.1 Performing Vendor Queries
- 16.1 Printing Vendor Records
  - 16.1.1 Printing Individual Vendor Records
  - 16.1.2 Printing Multiple Vendor Records
- 17.1 Vendor Items
  - 17.1.1 Adding Vendor Items
  - 17.1.2 Editing Vendor Items
  - 17.1.3 Deleting Vendor Items
- 18.1 Invoices
  - 18.1.1 Creating Invoices
  - 18.1.2 Editing Invoices
  - 18.1.3 Deleting Invoices
- 19.1 Purchasing – Reports
  - 19.1.1 Creating Purchasing Reports
  - 19.1.2 Printing Purchasing Reports
- 20.1 Links

## **Receiving Module**

- 1.1 Overview of the Receiving Module
- 2.1 Receiving Order Items Individually
- 3.1 Receiving Complete Orders
- 4.1 Receiving – Reports
  - 4.1.1 Creating Receiving Reports
  - 4.1.2 Printing Receiving Reports
- 5.1 Links

## **Labour Module**

- 1.1 Overview of the Labour Module
- 2.1 Creating Labour Records
  - 2.1.1 Adding New Labour Records
  - 2.1.2 Sending Email to an Employee or Requester
  - 2.1.3 Accessing a Contractor's Website
- 3.1 Adding Labour Specifications
  - 3.1.1 Adding Labour Specifications
  - 3.1.2 Editing Labour Specifications
  - 3.1.3 Searching Labour Specifications

- 4.1 Deleting Labour Records
- 5.1 Performing Labour Queries
  - 5.1.1 To Perform a Labour Query
  - 5.1.2 Labour Queries – Example 1
- 6.1 Viewing Equipment History
- 7.1 Printing Labour Records
  - 7.1.1 Printing Individual Labour Records
  - 7.1.2 Printing Multiple Labour Records
- 8.1 Labour – Reports
  - 8.1.1 Creating Labour Reports
  - 8.1.2 Printing Labour Reports
- 9.1 Links
- 10.1 Overview of the Timecard Module
  - 10.1.1 Adding/Editing Unposted Timecards
  - 10.1.2 Posting Timecards
  - 10.1.3 Editing Posted Timecards

## **Admin Module**

- 1.1 Overview of the Admin Module
- 2.1 Setting Up Web Work User Groups
  - 2.1.1 Adding a New Group
  - 2.1.2 Editing Group Access
  - 2.1.3 Deleting a Group
  - 2.1.4 Adding User's to a Group
  - 2.1.5 Changing the Group a User is in
  - 2.1.6 Deleting Users from a Group
- 3.1 System Security
  - 3.1.1 Setting Up Users Permissions
  - 3.1.2 Editing User Permissions
  - 3.1.3 Duplicating User Permissions
- 4.1 Changing a User's Password
- 5.1 Setting Up Web Work System Defaults
  - 5.1.1 Accessing System Defaults Feature
  - 5.1.2 Setting Work Requests System Defaults
  - 5.1.3 Setting Work Orders System Defaults
  - 5.1.4 Setting Procedures System Defaults
  - 5.1.5 Setting PMs System Defaults
  - 5.1.6 Setting Equipment System Defaults
  - 5.1.7 Setting Inventory System Defaults
  - 5.1.8 Setting Labour System Defaults
  - 5.1.9 Setting System Defaults
- 6.1 Setting Auto-Numbering
- 7.1 Work Order Status Codes
  - 7.1.1 Adding New Work Order Status Codes
  - 7.1.2 Editing Work Order Status Codes
  - 7.1.3 Deleting Work Order Status Codes
- 8.1 G/L Account Codes
  - 8.1.1 Adding G/L Account Codes
  - 8.1.2 Editing G/L Account Codes
  - 8.1.3 Deleting G/L Account Codes

- 9.1 Fault Codes
  - 9.1.1 Adding Fault Codes
  - 9.1.2 Editing Fault Codes
  - 9.1.3 Deleting Fault Codes
- 10.1 Administering Divisions
  - 10.1.1 Editing Data Divisions
- 11.1 Field Labels
- 12.1 Equipment Renumbering
- 13.1 Admin – Reports
- 14.1 Links

## **Reports Module**

- 1.1 Overview of the Reports Module
- 2.1 Viewing Reports
  - 2.1.1 Viewing Standard Reports
  - 2.1.2 Viewing Previously Created Custom Reports
- 3.1 Creating Custom Reports
  - 3.1.1 Creating Custom Reports – One Table
  - 3.1.2 Creating Custom Reports – Two Tables
  - 3.1.3 Editing Custom Reports
- 4.1 Printing Reports
  - 4.1.1 Printing Standard Reports
  - 4.1.2 Printing Custom Reports
- 5.1 Adding Your Logo to Reports and Work Orders

## **Links Module**

- 1.1 Web Work Links
  - 1.1.1 Adding Links to Web Work
  - 1.1.2 Physical Location of Linked Files
  - 1.1.3 Editing Existing Web Work Links
  - 1.1.4 Deleting Web Work Links
  - 1.1.5 Viewing Web Work Links

## **Web Work Codes**

- 1.1 Benefits of Using Codes
- 2.1 Coding Formats
- 3.1 Data Collection and Data Entry of Codes
- 4.1 Changing and Deleting Codes
- 5.1 Code Development by Module
  - 5.1.1 Work Order Type Codes
  - 5.1.2 Priority Codes
  - 5.1.3 Craft Codes
  - 5.1.4 Crew Codes
  - 5.1.5 Comp Remark Codes
  - 5.1.6 Manager Codes
  - 5.1.7 Procedure Codes

- 5.1.8 Equipment Codes
- 5.1.9 Equipment Type Codes
- 5.1.10 Equipment Status Codes
- 5.1.11 Sub Type Codes (1-5)
- 5.1.12 Manufacturer Codes
- 5.1.13 Location Records
- 5.1.14 Location Type Codes
- 5.1.15 Location Status Codes
- 5.1.16 Issue Unit Codes
- 5.1.17 Category Codes
- 5.1.18 Storeroom Codes
- 5.1.19 Purchase Order Status Codes
- 5.1.20 Vendor Codes
- 5.1.21 Purchase Unit Codes
- 5.1.22 Ship to/Bill to Codes
- 5.1.23 Terms Codes
- 5.1.24 Employee/Requester Codes
- 5.1.25 Work Order Status Codes
- 5.1.26 G/L Account Codes
- 5.1.27 Fault Codes